MarketingPro User Manual

"Reliable solutions for your marketing campaigns"

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Introduction

MarketingPro is an innovative product of Integrated Micro Systems, Inc. The story of innovation starts in 2010, when the IMS team used to work in this market to build custom designed campaign for large size companies. So after a year we decided to develop our fully automated product to not only make these services available to all other companies regardless of their size and make it inexpensive but also make it easier to use and solve the problems that we experienced during last few years. Over the period of almost more than a year MarketingPro has come a long way not only in terms of stability but also features and other offerings.

Last few years lots of imitators came into the market with the email marketing solutions but MarketingPro still stands out in the competition. **MarketingPro** is the most trusted name in email marketing and serves to thousands of users worldwide. With its powerful and proprietary sending technology, it sends your email campaigns in the matter of time with the features like personalization, filtering, follow ups, automated verification, bounce processing, seamless integration with your existing website design and much more. It's the most advanced Mailing List Management Solution providing all the necessary tools and features that you need.

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MarketingPro doesn't just stop by providing you the easiest way of sending your campaigns but also provides you with the precise statistical reports such as - read ratios, link click statistics, feedbacks, reviews and much more.

We have tried to simplify our manual as much as we can – we would like to receive any feedback or any suggestions our esteemed clients may have. We will try and work on those suggestions to improve our offerings.

We thank you for choosing MarketingPro as your mailing list management and marketing solution.

Cheer
Imsis Team

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Features covered for User

Logging into User Section

The MarketingPro user panel will help you manage, update and create all the aspects of your marketing and campaign management.

When you access your user section, you will be asked to key in your username and password. Please enter your username and the password in the respective fields and click on the Login button to access the MarketingPro user section.

In case if you forget your password you can click on **“forgot your password”** link and retrieve the password information.

If you wish MarketingPro to remember your login, check the box **“Remember me on next login”,** which is just below your username and password fields. This will allow MarketingPro to remember your login information next time you access the user section.

In this detailed MarketingPro manual we are going to learn how effectively we can use the advanced features of MarketingPro.

Users have total control over every aspect of the MarketingPro system. Users may create and manage thier lists and campaigns for as many clients as they licensed for and allow all clients to have access to certain campaign results on the MarketingPro system.

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The dashboard is the quick overview of the MarketingPro system and gives you the basic statistics for your overall campaigns, subscribe and unsubscribe statistics.

The dashboard has web 2.0 innovative design which makes it very easy to implement all the functionalities necessary to manage your campaign in one place. On the tab section on the top left side of screen you have three tabs: campaigns, lists, and subscribers. And on the right side you have setting and logout button, and on the top it has the link witch shows the user limitations and available points and a place to purchase more points if it's required.

Let's start with lists. Under the lists, you can create and manage you lists. On overview or lists tab you just need to click on the "create new list" button and give your list a meaningful name and select the type of your list. If you pick double opt-in, every subscriber in your list will receive an email to confirm their subscription. The next option you have is if you want to hide your list from the subscription area. Most of the times you need to check mark to hide your list and select "No confirmation required" from the drop down menu.

Now that you have your list created, you have the option to create custom fields on it.

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How to work with custom fields – how to create them and use them in the mailing lists

In order to provide you with a great flexible environment MarketingPro allows you to create custom fields in your subscribers' lists which can be used to track the extra user information or data.

When you create a mailing list sometimes you want to track some extra user information – say where they are located, or their age, sex, etc. This information gathered from the user could be used to carry out a targeted marketing.

By creating custom fields in MarketingPro you can always add a "Profile Update" page to your campaign and have your subscribers fill out as much sensitive information as they wish. This will help you in your upcoming campaigns to exactly target certain parts of your subscribers, or advertise to a list what the majority of that list needs.

For example – you want to send an email to your mailing list and specifically to those who own a laptop. In the case of custom fields you can only select those subscribers who own a laptop using the rules based targeted sending option on segment panel of list.

This is one of very powerful features of MarketingPro which will allow you to avoid creating multiple lists manually for different types of parameters such as whether or not your subscriber owns a laptop, or if they own a laptop of a particular brand, etc.

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MarketingPro's custom field feature extends the capability of tracking extra data for the CRM (Customer Relationship Management) purposes and takes your marketing campaign process to a whole new level.

Let us now work with the custom fields. In order to create the custom fields select your list and then on the left hand side click on custom field. This screen will list the existing custom fields if you have any. In order to create a new custom field you need to click on the Create custom field tab.

MarketingPro offers several field types to be selected for making a new custom field. As per your selection of the field type – MarketingPro will automatically generate a database entry for that custom field.

Field types offered by MarketingPro:

MarketingPro offers single line text fields, hidden fields, paragraph text, list, drop down list, check box, radio button, and notice text.

You have plenty of options to choose the type of the custom field you wish to create. For this manual we will use Text Field as an example. After your select the type of field, you need to click on "create custom field" button.
You will be given appropriate options to fill up for this custom field depending on the type. For text fields we need to populate the following information:

Name: Title of the field in order to identify what type of data the end should supply.

Default Value:

Default value is the dummy value for the subscribers ease of use. This will help the subscriber to understand what information he needs to provide. This absolutely depends on you whether to use it or not.

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Validation type:

Select the validation type out of the 5 validations available in MarketingPro:

1- *Do not apply:*

This is selected when you don't want to make the custom field compulsory for the subscriber.

2- *Accept only numeric value:*

This can be set to accept only numbers. The field will not accept any data except the numbers.

3- *Accept only letters:*

This option can be set to accept the

text input.

4- *Accept letters and numerical characters only:*

This option can accept both the types of inputs – numeric and character as well the combination of both.

5- *Check for email format:*

This option will validate the email format – if the input made by the subscriber is not a valid email format – this will show an error.

After you populate all the information for the custom field click on the Add button. This is how you can create multiple – unlimited custom fields for tracking any additional user information.

How to work with custom field value validation

We have seen in our previous section on how to add multiple custom fields so that we can extract some extra information from the subscriber for targeted marketing.

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When you create your custom field – one of the most important things is the value validation of that custom field. Sometimes people tend to enter any random information for these extra fields when they are not ready to share this information.

Obviously one can never make sure that the information entered by the person is the correct one or not. But to avoid it to a certain extent, MarketingPro allows you to do the value validation by providing 4 validation methods.

(1) Accept only numeric values:

This validation method allows you to validate the input to the numeric values (if the value inputted is a numeric one or not). This way the subscribers will not be able to input any random value except the numbers.

(2) Accept only letters:

This validation method allows you to validate the input to the letters only – if the value inputted is anything but letters, MarketingPro will not accept the value.

(3) Accept letters and numerical characters only:

This validation method will allow you to accept numerical values as well as characters.

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(4) Check for email format:

This type of validation will ensure that the person entering the data which is of an email format.

(5) URL:

This validation method will allow you to accept a url.

Using custom fields to track extra information for customer relationship management

We have seen in the last two sections – on how to add the custom fields and do the validation of each field. In this section we will see how effectively these fields can help us have a sound customer relationship management [CRM] and/or behavior management.

What does CRM means?

CRM stands for **Customer Relationship Management**. It is a process or methodology used to learn more about customers' needs and behaviors in order to develop stronger relationships with them. There are many technological components to CRM, but thinking about CRM in primarily technological terms is a mistake. The more useful way to think about CRM is as a process that will help bring together lots of pieces of information about customers, sales, marketing effectiveness, responsiveness and market trends.

How MarketingPro helps you collect the information about your customers?

MarketingPro's built in custom field generation facility allows you to create unlimited custom fields for your mailing lists. These fields can collect the information for your subscribers when they subscribe to your mailing lists or

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during profile update process and MarketingPro adds them to the database.

Using this information you can get the basic idea on the customer's preferences and preferred options. These options can help you decide on how you tap these customers by targeting them using the specific information submitted to you by the subscriber.

When you start a new campaign you can use these options to decide whether this campaign should go to a set of people.

For example if you have a custom field tracking the operating system your subscriber uses, and if you need to tell your subscribers that there is a new product you developed for this particular operating system. Now when you have custom fields enabled and have the data ready with you for the customers having windows, linux or any other operating system then you can easily target these clients by filtering them, using custom fields.

This will not only help you save your time, bandwidth as well as accuracy of your campaign. When you filter the subscribers by the parameter of a specific operating system you will only be sending your message to a set of the group using that particular operating system.

This will work more effectively as you will be targeting only few customers depending on the filter criterion.

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Import Functions

Import function is important for those who want to import a huge database of their subscribers to MarketingPro's subscribers' database.

In this section we will see how to import the database of subscribers using the comma delimited file, or MySQL table.

Using Import utility

MarketingPro allows you to import your subscribers email addresses and other information to the database very easily. There are three methods available to import the data into your MarketingPro database.

Once you are in the LISTS tab, you can click on an existing list or a list you just created. In order to access the Import function you need to click on "Subscribers Actions" drop down on top and select "Add Subscribers". Here it will allow you to add subscribers either with filling subscriber form or add them by copying & pasting each subscriber and all the custom fields comma separated in separated lines, which is a useful option for small amount of subscribers but when you are dealing with huge listing you just have two options (1) Comma Delimited file (2) MySQL Table.

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Comma Delimited file:

Using this method you can import the CSV file. You can define your custom delimiters and can also choose the field enclosed symbol if it applies.

While importing the subscribers you can also set the import options such as.

- If you want to add your list into the suppression list (we will explain about this later)
- And if you want the duplicate record to update the existing or not.

Let's check what all the options are that we need to populate in order to import the data from the comma- delimited file.

Target Mail List	
Select the target mail list in which you plan to import the subscribers from the comma-delimited file. You can also select the multiple lists by holding down the CTRL key and selecting multiple lists.	
CSV File Location	
Path to data file:	Provide the path to the CSV data file – or you can upload the data file using the "**Upload data file**" option.
Upload data file:	Upload the data file using this option.

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CSV File Settings	
Fields terminated by:	You need to define a delimiter for terminating each field.
Fields enclosed by:	You need to define the delimiter for enclosing the field – i.e. the data between this enclosed symbol will be
Duplicate Checking	
Using this option you can avoid importing duplicate subscribers to your mailing lists.	
Import options	
You can set these options if you want, depending on your choice: • Do not import black listed subscribers • Do not import banned subscribers	

Importing your data from MySQL table:

Now let's see how to import the subscribers' data from the MySQL table. Click on the MySQL table link under the Import Subscribers menu.

Here in this type of import option you need to define the MySQL Host, MySQL username and password, the database name and the table name where the email addresses are stored. You need to fill the form with your database connection information and at the end write a SQL command that would retrieve the data you want to upload from your MySQL table.

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MarketingPro will automatically connect to the database using the information provided by you and add all the email addresses in the MySQL table to your MarketingPro database. This option is very useful when you have to transfer subscribers from other databases to the MarketingPro database.

At the end you need to map the fields you have on your list with the one out of the data file you try to upload (EX: map emails to go to email field on MarketinPro Database).

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How to assign clients to mailing lists and campaign

In the previous section we went through the steps on creating lists and adding prospects to your lists. In this section we will see how to assign a client to the mailing list.

What is a client in MarketingPro?

MarketingPro gives you the option of creating an account named as client account which can be used to check the basic activities of a particular mailing list.

When you are running a campaign for one of your client – you can enable a client account and allow that client to check the activities of the different campaigns for different or a single list. This will give you the ability to give each of your client access to view activities on a certain list which belongs to that client only, without having access to any other lists.

If you need to create a new client then MarketingPro offers the facility to assign the mailing list on the client creation screen itself. In case you need to assign an existing client to the mailing list, you can do that by listing the existing clients and then editing their preferences.

In order to create the client you need to click on the "Settings" on the top right of the user dashboard and click on "Clients" on the left side menu. If there are existing clients you can see the list of the clients. Now you need to click on the "Create Client" link in order to create a new client.

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Subscribers related functions

In this section we will see how to work with subscribers, how to list them, add them, import them, export them and allowing them the access to their subscription area.

Working with subscribers – listing them and managing them

MarketingPro backend is based on highly optimized algorithms and has the capacity to handle large number of subscribers in a single database. MarketingPro subscriber management is very sophisticated giving you the ease of use to manage the subscriber database for your mailing lists.

It also allows you to search the subscribers based on the different criteria. For example you can search or sort your subscribers by custom fields, ascending, descending, etc., from a particular list. This makes it much easier for you to sort the subscribers and manage them.

In order to browse the subscribers you need to click on subscribers tab on user dashboard, and select the list you want to list from drop down and click on "Apply filter" button. On top of the list there are links to select and change the sort of the list and add other custom fields to your list and finally there is a navigation drop down to move through the paging of your list. You also have a link which enables you to export your list to a CSV file.

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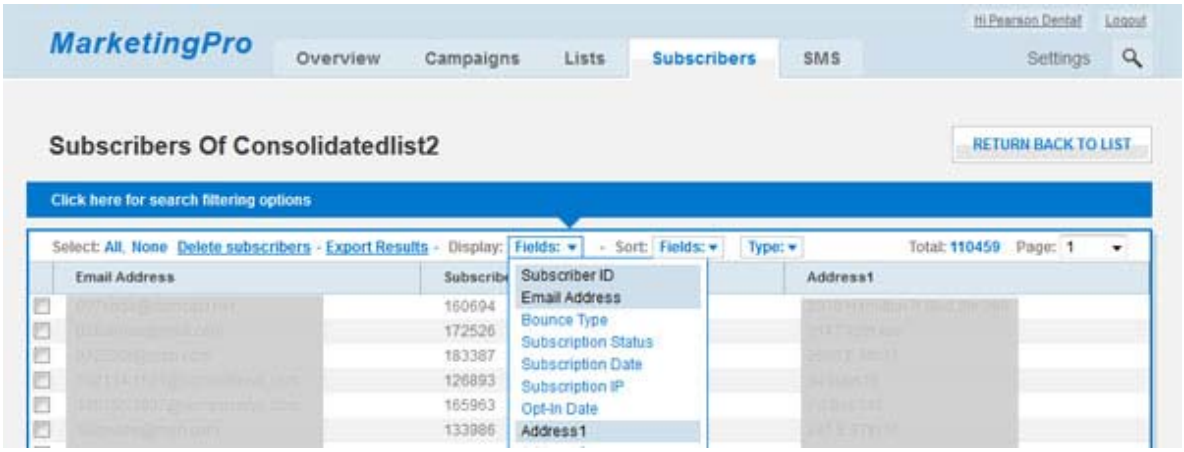
Let's take a look at all the options we have when we select the "Browse subscribers" search criteria.

First Click on "Lists" tab on the top menu, then click on one of your existing lists. Once the list shows, click on the "Subscribers Actions" drop down and select "Browse Subscribers". In this screen you can do the following:



"Display:" drop down:

You can select or deselect any fields to display that information in your subscribers' list.

"Sort:" drop down:

By selecting any of the fields, your list will be sorted by that field. Sort "Type" drop down will let you sort your list with chosen field in ascending or descending order.

Search for:

You can click on the "Subcribers" tab on top menu, or click on the "Click here for search filtering options" when you are in your list as shown below.

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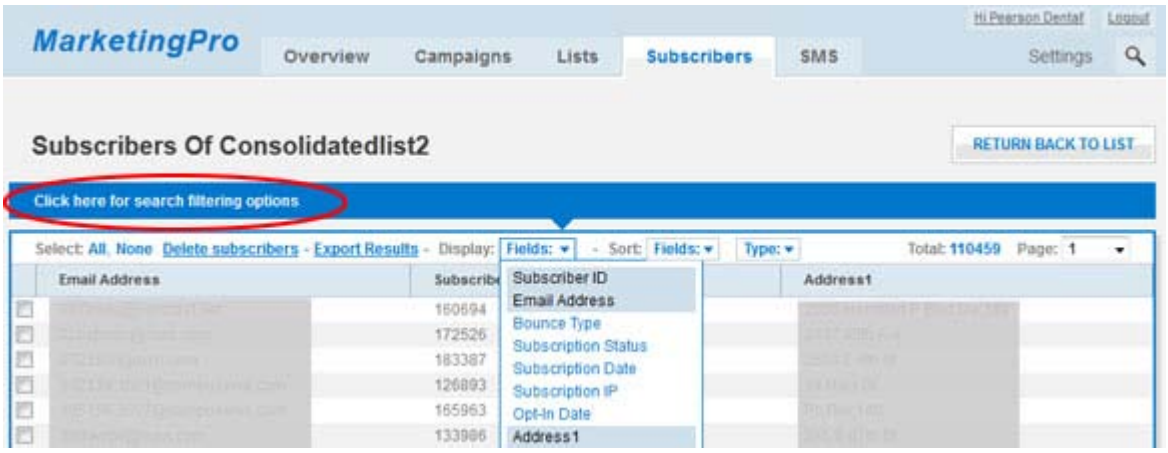

You may specify some keyword to search in the following fields as well as all of your custom fields:

- Email address
- Bounce status
- Opt-in confirmation status
- Opt-out confirmation status
- Subscription status
- Subscription date
- Un-subscription date
- Opt-in confirmation date
- Opt-out confirmation date
- IP used on subscription
- IP used on un-subscription

ou may select a particular list or can select the option “any” to have all the lists included into your search parameter.

You can use add new rule to create a search criteria and then you will see all the subscribers’ data according to your search criteria. By clicking on any of the subscriber you can get to subscriber profile and make any changes on the subscriber information and custom fields. On profile update page you have option to delete or unsubscribe the subscriber.

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Suppression List and Global Suppression List

In other words, Global Suppression List means 'Do Not Send List'. Your campaigns will not be sent to subscribers which exist in your suppression list. There are two types of Suppression lists. Local Suppression list and Global Suppression list.

The difference between global and local suppression list is, global suppression list in affect for all your subscriber lists. Local suppression lists are in affect for the owner subscriber list only.

You can add email addresses to global suppression list to avoid sending any email campaigns in the future even if you create a brand new subscriber list.

This is how you block some subscribers to access the newsletters from your mailing lists.

You can add subscribers to Suppression list (Local or Global) exactly the same way you create a list with the difference that you will check one of the following options:

- Add to global suppression list
- Add to list's suppression list

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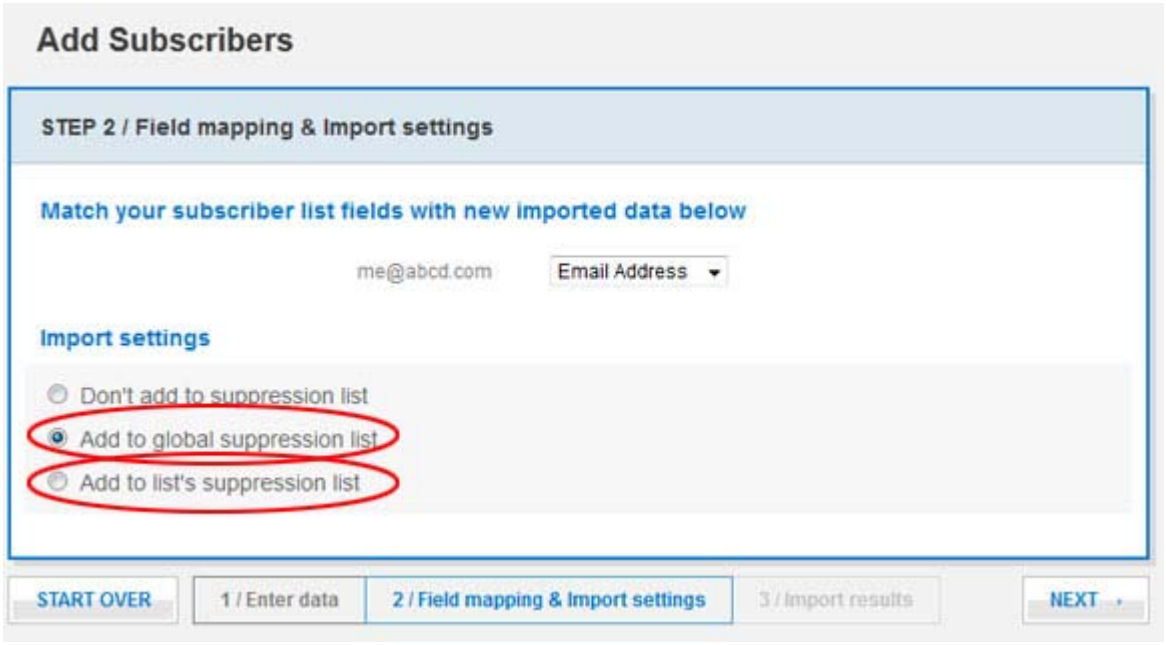
Add Subscribers
STEP 2 / Field mapping & Import settings
Match your subscriber list fields with new imported data below
me@abcd.com
Email Address
Import settings
Don't add to suppression list
Add to global suppression list
Add to list's suppression list
START OVER
1 / Enter data
2 / Field mapping & Import settings
3 / Import results
NEXT

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Working with Campaigns

After looking at all the lists and subscribers management option like setting up opt-in or opt-out emails, importing subscribers, exporting subscribers, etc – let's now move on to campaigns. In this section we get into details on how effectively create and manage your advertising campaigns.

MarketingPro provides a very easy and smooth process to create a campaign. MarketingPro also allows you to customize your campaign depending on your preference, such as creating a CMS based campaign, adding the extra tags to track the read ratios, link click ratios, schedule campaign delivery for a certain date, etc. We try to keep this section as simplified as possible.

Creating your campaigns in couple of easy steps

By now you must have realized that MarketingPro is really easy to use. Here you will learn to create an advanced campaign management system as MarketingPro provides you a very simple way to create your campaigns in couple of simple to follow steps. Let's see how.

In order to create your campaign click on the "Campaigns" tab and then click on "CREATE NEW CAMPAIGN" button. You will now be directed into an easy to use campaign creation wizard. In the next screen you need to key in the campaign name witch is the name for identifying your campaign. Once you enter the name you need to select the recipients which are your lists or segments of a list. So select which list you want your campaign to be sent to. You have the option to select a single list or even multiple lists. Once you select your list you can click on the "CREATE CAMPAIGN AND EDIT CAMPAIGN EMAIL" button.

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On this part system will give you a few options to create your email content. You can use template based email, copy from previous campaign, or create your email from scratch. This step will provide you with many options like scheduling options, campaign information, and set the email address for the from or reply- to fields.

Content Type:

Select your content type. You have three options

(1) Text email (2) HTML email (3) HTML+TEXT mail

Depending on your selection whether you would like to have your campaigns in text or html mode the MarketingPro will give you the respective editor. [i.e. either text editor or the rich text advanced editor]

Once you click on the “Continue” button MarketingPro will generate the rich editor box in which you can design your email. The rich text editor has two modes, HTML and EDITOR mode. Html mode is for advanced users who can write HTML code and like to have total control over their design, while the EDITOR mode is for average user want to be able to design their message using the available options on tools bar without any coding.

This is a full fledge HTML editor with the facilities to paste from the word documents, linking the images, creating the url links, forms, changing the text to bold, italics, underlined, changing the alignment, adding bullets and numbering, changing the font, font size, text color, background colors, find and replace, and more.

Almost all the available features in a professional HTML editor are available at your disposal with MarketingPro, and it also provides you with the option to attach the files to your campaign as well.

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The final step – Once you are done creating your campaign just click on the "Save and next" button. The last step will give you the brief campaign information with the options you have defined. At this step you have the ability to Preview the Campaign by sending it to a particular email or in a Browser. It also provides a way to check on spam rate of your email design to help you create an email campaign to land in your subscribers' inbox rather than the spam filters.

Once you are happy with the way your campaign looks you can click on the “NEXT” button. This will save the campaign and will take you to the SEND scheduling.

Set Campaign Schedule options

This option will allow you to schedule a campaign to start sending at a certain date and time. This means you can send your campaign in future for single time or you can send it in the future for multiple times.

This option allows you to not only set the specific time but also the date. It also allows you to choose whether this campaign will be sent in the future multiple times – like every day or every Monday or every month and how many times you would like to send it.

MarketingPro will start delivering your email campaign to your mail gateway at the defined time and period.

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How to create and save the draft of the Campaign

In order to create the campaign and save it as a draft – follow the steps in the previous section up to the **Schedule option** on the screen. Just select never option and follow all the other steps as it was explained in the previous section of campaign creation.

Once MarketingPro backend detects that you select **never** option, it will save your campaign as a draft of the campaign. You can always click on the "CAMPAIGNS" tab on top and click on "Draft" on the left menu to see your created campaign and edit or send it.

Send your campaigns to multiple mailing lists

This feature allows you to send campaigns to multiple mailing lists. Some email managers only allow sending your campaign to a single list – so for multiple lists you need to repeat the same work over and over.

MarketingPro makes it easy to select multiple lists when you go through the campaign creation wizard. The first option of the campaign wizard is to enter the name of the campaign. After you enter the name of the campaign MarketingPro will give you the option to select a single list or the multiple lists.

In order to select the multiple lists just hold down the CTRL key and select all the lists you wish the campaign to be sent to. That's about it. You are ready to send your campaign to multiple mailing lists.

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Effective use of targeted email campaigns using the sending rules

This section explains the most advanced feature of MarketingPro – **"TARGETED EMAIL CAMPAIGNS"**

What do we mean by Targeted Campaigns?

The simple explanation of the term **Targeted Campaign** is to send your newsletter or advertising only to a particular audience having specific interests or parameters.

As we discussed earlier, MarketingPro provides the custom fields generation. You use this option if you want to track some additional information about your subscribers, like how much monthly income a person has, what type of car he owns, whether he owns a website or not, etc.

Now for example, you can create a campaign which only targets the people with a certain level of income. If you are not provided with the facility to sort the data and to send the campaign only to that portion of your subscribers, it would be a big hassle for an administrator to find out whether the subscribers have a certain level of income or not. If you have say around 10,000 subscribers – searching for each and every subscriber and then making another list for them and then targeting your campaign to them. Ahhhhh. This seems a lot more complicated. Doesn't it? So rest assured MarketingPro has made this process easy for you by using an advanced segment technology.

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Advanced segment technology- Selecting and naming different segments of a list

Please follow these steps: Click on the "Lists" tab on top and select any of your list, then click on "Segments" on the left menu and on the next screen you can click on "Create segment" to create your segments using the rules and available custom fields based on subscriber's information or activity levels.

Here are the six rules parameters provided for our first field:

- Equals to [whether our first field i.e. subscription date equals to]
- Greater than [whether it is greater than the subscription date]
- Smaller than [whether it is smaller than the subscription date]
- Not equals to [whether it does not equal to the subscription date]
- Includes [whether the subscription date includes]
- Not includes [whether the subscription date does not include]

This is how you can create multiple send rules to make sure that the email is going to only those who match all the conditions of a send rule.

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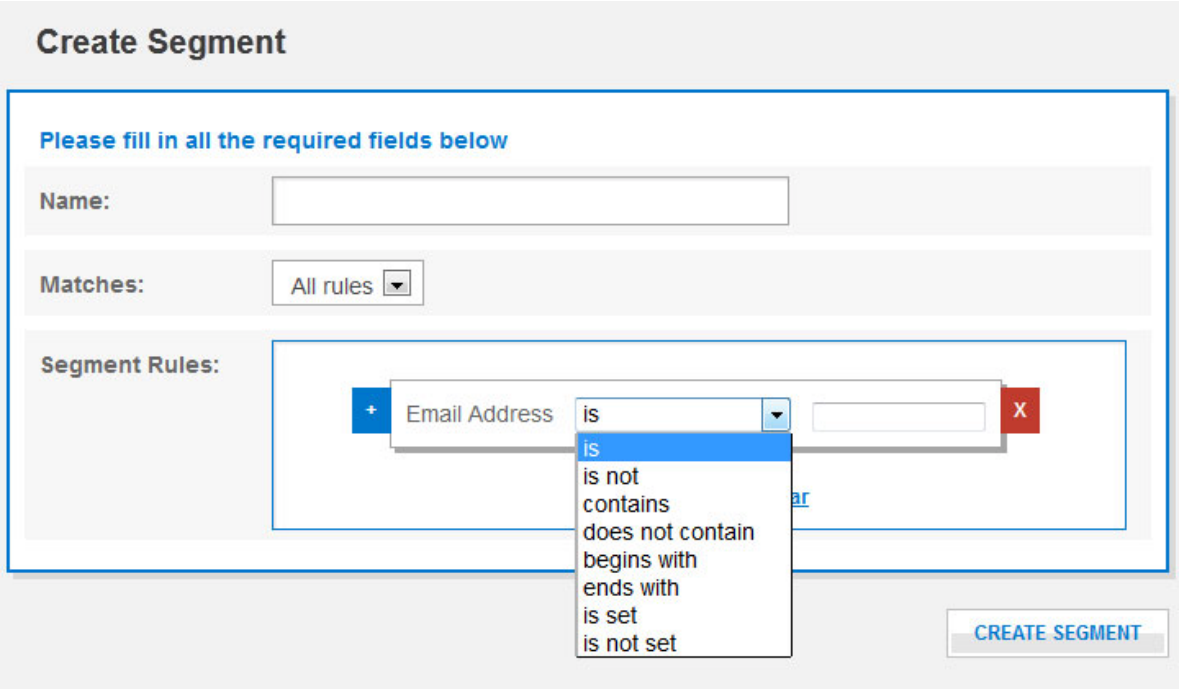

I order to create more rules, just follow the same steps on the previous topic of how to create sending rules.

Working with advanced scheduling system – sending campaigns on a specific date, time or multiple times

MarketingPro provides you a great deal of scheduling features which not only enables you to schedule your campaign for a particular date and time, but also allows you to send the scheduled campaign for multiple times.

Let's take a look at how it works. When you follow the first three steps of creating a campaign wizard you will be provided with the schedule options available at our disposal.

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This process will give you the number of options like

- Never (This saves the campaign for future launch)
- Now (Send immediately)
- On given date and time (Send in the future at a specific time)
- Repeatedly (Send in the future multiple times)

Depending on your selection the menu just below the above selections available will be activated to set the time and date.

When you select **"On given date and time"** – you will be given the option to set the time and the date only.

When you select the 4th option "**Repeatedly**", you will be provided with the option to set the frequency of your email – i.e. whether to send it every day or 1st day, 2nd day of a week or a month, and so on. You also have the option to select the days – like every Monday, every Tuesday, etc. You can also schedule your campaign to be sent every month instead of defining the days.

The last option can be used to specify how many times a campaign should be sent.

This way you don't need to worry about sending your campaigns multiple times and don't need to waste time to create the same campaign again and again whenever required.

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Creating your campaigns using an advanced Email Template system [CMS based]

WHAT IS CMS?

Let's first understand what CMS means. CMS (Content Management System) is the most popular way of creating a website or email layout and manipulating the content of it. Usually, this technology is being used in web page content management, however, MarketingPro includes this powerful technology to create and manage your campaign layout. This way you can create more efficient email campaigns in shorter time.

EMAIL TEMPLATES

MarketingPro's unique feature, "Email Templates", offers you a great flexibility to create and manage your emails, newsletters, etc. Email templates let you create and set an email design layout. This way, your system users will only be able to edit editable regions and your email design layout will not be affected. Also, if you are providing marketing services to your clients, your clients will only submit the content and MarketingPro will insert the content to the correct areas in the template. Therefore you will only need to design the template for the first time, and your design will not be changed while sending your email campaigns.

BENEFITS OF CMS BASED NEWSLETTERS OR ADS

Below, some benefits of this feature are listed. You will discover more benefits when you start to use this feature:

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- Save time on creating email campaigns
- Define templates and your users will be able to change them
- Save your design format
- Insert dynamic contents to your templates
- Define multiple content blocks in your templates
- And much more...

Creating an Email Template is as easy as creating a traditional layout. MarketingPro provides a few free template layouts which you can seamlessly integrate into your CMS program. These templates are just the layout design and do not have the tags necessary for the dynamic content editing.

CREATING AN EMAIL TEMPLATE

In order to create a new CMS based template click on "Settings" on the right top of the user dashboard and then click on "Email Templates" on left menu.

Now you will see a list of existing template if you have any and to create a new one you need to click on the **"Create email template"** link on top. While creating a template you need to make sure that the images you use have a proper URL links, otherwise they may not show up. On this screen you will be provided with couple of options which will be useful in identifying the template.

Description	
Template Name:	Define the template name for identification.

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Template Description:	You can also have a template description for making the identification a little more comprehensive.
Thumbnail:	You can upload a small image of the template design (Optional). This will help you to identify your templates
Preferences	
Subject:	Define the subject of your template email
HTML Content:	HTML code of your template you can copy from rescue section or use your own. Custom fields are available to use in your design as well.
Plain Content:	TEXT format of your content including the custom field you use on your design.
Image Settings	
Embed Images to the email **It is advised that you do not embed your images and styles since some of the email filters and scanners can treat these images as a virus threat and can reject your email.**	

Before you can click on "PROCEED TO TEMPLATE BUILDER", make sure to click on "Email Contents" tab and fill out the options. If you forget to do this part, you will get a "Some Validation errors occurred" message in RED. Under the "Email Contents" tab fill out Subject, your HTML Content and if you like your plain content. You can copy and paste the html content from any layout or template into the content area of email. Now you may click on "PROCEED TO TEMPLATE BUILDER".

On the Template Builder screen, click on "View Properties" button on the bottom, and you will see the elements of the email in the blue box on the

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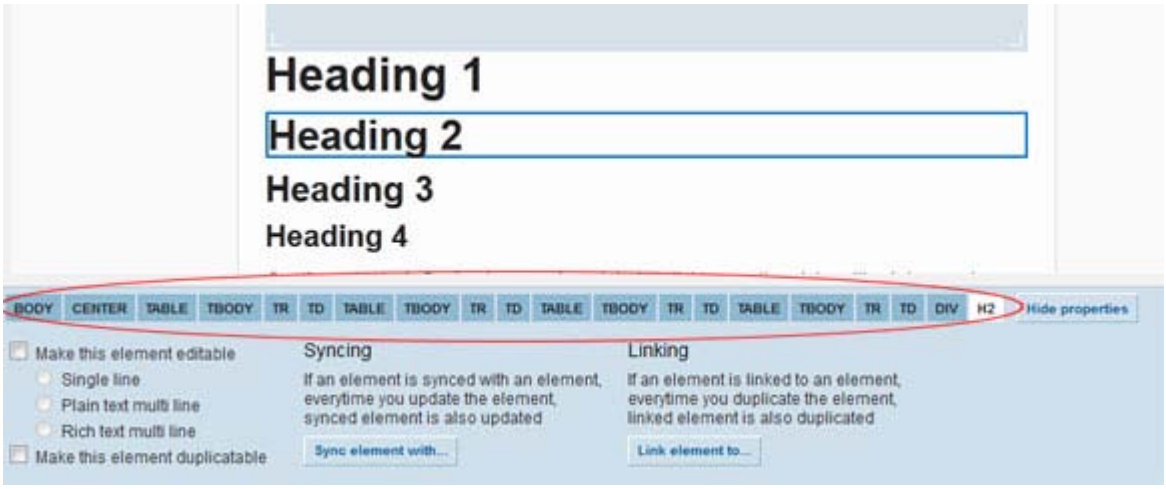
bottom.


Heading 1
Heading 2
Heading 3
Heading 4
BODY CENTER TABLE TBODY TR TD TABLE TBODY TR TD TABLE TBODY TR TD TABLE TBODY TR TD DIV H2
Hide properties
Make this element editable
Single line
Plain text multi line
Rich text multi line
Make this element duplicatable
Syncing
If an element is synced with an element, everytime you update the element, synced element is also updated
Sync element with...
Linking
If an element is linked to an element, everytime you duplicate the element, linked element is also duplicated
Link element to...

Either by clicking on different areas of the content, or clicking on the buttons circled on the figure, you can highlight each element of email, and once highlighted, you can apply different rules. You can make different elements editable, sync or add links. You will have the ability to make each element editable the way you want.

You can select an image, a text line, or a paragraph and define if it is a editable, or could be duplicated, etc. For email you have to select "Multiline editable" so later when user selects this image the system will provide him a rich editor, which will allow him replace your template image with the one they have. After assigning the right property to each and every part of your template, you need to save it and give it a Test Drive to make sure it works as you planned it. Later on the email design section of "Create a New Campaign" if you select template based email you will see that your template is listed there and you can make changes to it to create your email fast and easy.

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Creating your campaign on the Fly with the built-in HTML editor

Now that we have seen how to create our templates and use those templates to create a campaign, let us see how we can create a campaign on the fly.

Follow the first few steps as explained in Create a new campaign to get to the part that how you want to build your campaign. At that point select "Create a campaign from scratch". Once you select this option – populate all the options and click to proceed to step 2. Here you need to select the content type as if you want a text email, html email or both. Next if you select HTML or both you will have on the fly HTML Editor which can be used to edit your content and create an "On the fly Email Campaign". Here you should add the subject of your email and add all your content required for an email or newsletter. Once you are done adding the content proceeds to next steps as explained in the "Create a new Campaign" section. Once you do that you will be shown brief information on your campaign and also given the option to preview it. Once you are sure everything looks the way you want it, and then click on "Save Campaign" button.

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How to link to your content page instead of creating your campaign on the Fly?

So far we have seen how to create campaigns through the built in Editor integrated into MarketingPro or using template design. MarketingPro also provides the ability to link to a HTML page instead of creating a new campaign on the fly using the editor.

In case if you want send content as an email and which is already created on your server under your website, you can simply link this URL using MarketingPro and all the content will be sent to subscribers as a newsletter. This feature is a great addition for people who know to make a web page, or already have their Ad or newsletter designed in HTML format.

Here is what you need to do: In the "Create New Campaign" section, select "Fetch from URL" and In the next screen you will be able to see that after the Email subject line you have the option to add URL where your Ad content is located. This URL will allow MarketingPro to fetch the content from that location exactly the way it is designed and integrate it as an email. That's it – now you can directly link your content of the email through a URL.

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Sending email in multiple formats – HTML and/or TEXT

You know by now how to create your campaign. In this section we will once again see how to send emails in multiple formats – html and text.

When you create a new campaign – on the second Step MarketingPro will give you the option to choose the type of the content you want to send to your mailing list. You can select simple TEXT only format, HTML [rich text] Format and finally a combination of both TEXT and HTML. In case if you choose TEXT+HTML format then the subscribers who are subscribed to TEXT format will receive an email in the normal simple text and those who are subscribed to HTML format will receive an email in rich text HTML format. MarketingPro will generate the editing boxes for html and text email depending on what you choose. You will be able to edit your TEXT and HTML content through these editing boxes and will be able to send your email in multiple formats.

Defining different email address for each field and campaign [reply-to and from]

With MarketingPro you can define different email addresses for reply-to and from. Setting up these addresses not only helps you manage the bounced emails easily but also we can be assured that if the client replies back, we can receive the email from a certain subscriber.

In order to set the different email addresses please follow the steps for creating a campaign up to the first step. Here you can select the Send email from address and name. You can also select a separate email address for Reply-to and Return-path if you wish. Once you select these addresses proceed to the next steps and complete your campaign with other information.

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When the MarketingPro sends an email – at the subscribers end it will show where the email came fro. When the subscriber replies back to the email he will reply back to the email address defined in the **Reply- to** field. This is how you can effectively set these addresses and carry out your campaigns in a most sophisticated manner.

How to add link tracking and click tracking elements to your emails/newsletters

When you send your campaigns through MarketingPro – MarketingPro not only allows you to send your campaigns effectively and efficiently but also allows you to track the link clicks and the read ratios of your campaign.

MarketingPro will track all the links clicked and read ratio (Opened emails) data automatically and store them for the administrator / client as a statistical report. This allows the client to get the idea about the campaign success. MarketingPro will automatically add the necessary tags into your campaign in order to track that data.

Whenever subscriber clicks on a particular link – MarketingPro will record the click and save it to the database for the future statistical analysis. Similarly it can also track how many times a person has read the email sent by the MarketingPro system. These are very useful and important features to track the important statistics.

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Personalize your emails with custom fields

Well MarketingPro provides an easy to use process which would allow you to personalize your email with the custom fields you capture on your mail lists.

Let's first list the places you can use your custom fields:

- On subject of the email
- On html content of the email
- On plain text of the email
- On the URL you try to fetch your email from
- On creating segment of your mailing lists
- On creating filter in the subscribers area

MarketingPro provides us a few different types of custom fields to help user to personalize his campaign based on a variety of parameters. Here is the list of different custom fields we have available to utilize:

- Any custom field user has defined in a mailing list and uploaded data for each and every subscriber.
- Subscriber information as far as bounce type if they have any, opt-in/opt-out date and ip address, subscription and un-subscription date and ip address.
- Campaign links, such as links to: forward to a friend, view on browser, report abuse...
- List links such as a link to: subscription page and a link to un-subscription page
- List information such as list id, list name.
- User information, including all the information about the user who designed the campaign.

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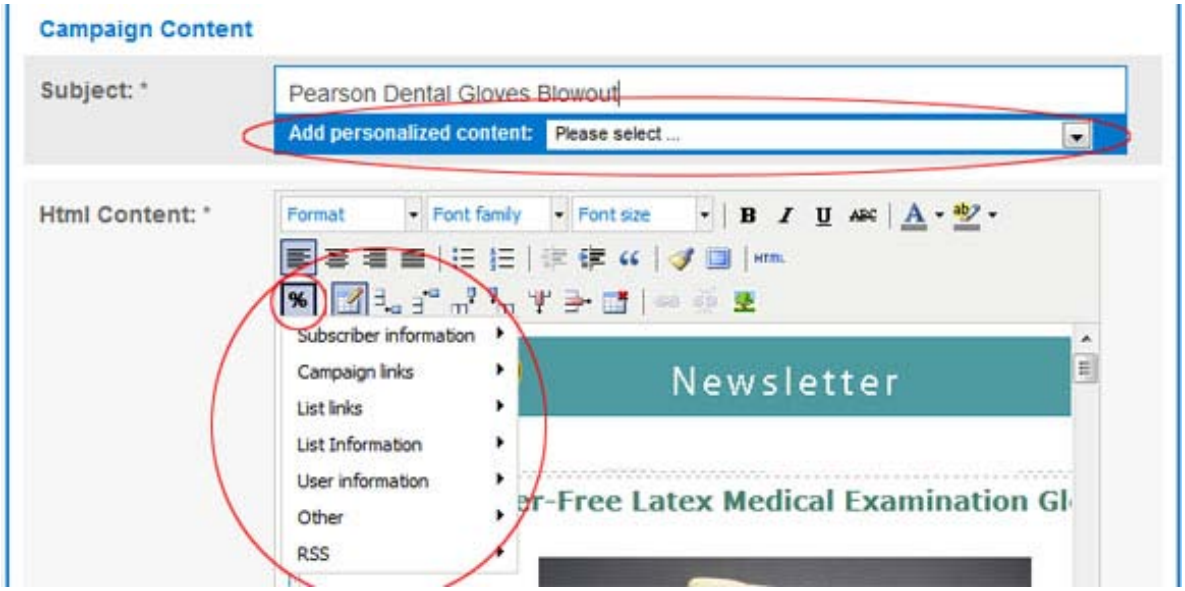
- Email delivery date.
- **Conditional custom field**- This is one of the most advanced features that allows you to have variable content, based on the value of custom fields.
- Activity log witch has information about opened campaigns, clicked links, etc... that subscriber has performed.
- RSS, which is used to fetch dynamic content from any RSS feed in the email campaigns and auto responders.

In order to utilize this functionality on the places that you have text field like subject of the email you will get a list of custom fields as a drop down right below the text field. And on the places that you have rich editor you have a "%" button on the top toolbar that if you click on, it will give you a list of available custom fields grouped in different categories in a popup menu format.



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Preview your email before you send it to the lists by sending it to your email address

It's always better to preview your newsletter or email you are planning to send across to your subscribers. This is mainly because when you preview the email you can examine if all of your content is going through the way you have planned and how it looks. In case if there is something which you would like to change you can change it before actually saving it and start sending the email.

Once you are done with the content of your email you will proceed to the next step of preview and save. You have two basic options for previewing your campaign.

(1) Preview by email
(2) Preview on browser

Preview by email option will allow you to preview your campaign through email. This will send an email with the campaign content to the email entered by you.

Preview on browser will open up a pop up window inside which it will show you how the campaign would look in a browser.

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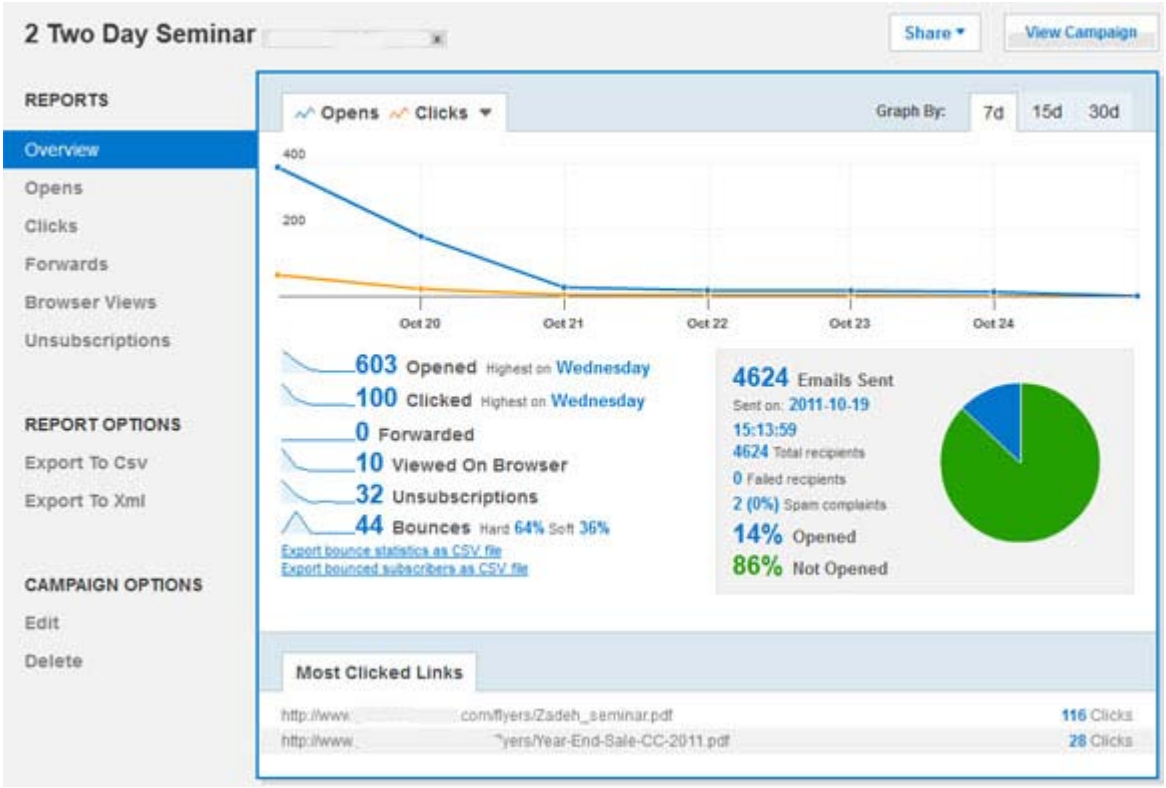
Track your campaigns in real time – track the read ratios, click through, sending performance, failed recipients etc.

After you are done creating your campaign the most important part is to check how successful your campaign was or is. MarketingPro provides a very sophisticated system which tracks the read ratios (Opened emails), click through of the links inside your email, sending performance and how many recipients failed to receive the email.

In order to check all these things – you need to click on the Campaigns tab and select your campaign between the listed campaigns. This will take you to "Overview" screen of that campaign. In this page you can follow the live statistic of the campaign in a web 2.0 output along with charts and graphs.



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Here you can check the read ratios by clicking on the “Opens” link. You can check out the Link click statistics by clicking on the “Clicks” link. Along with these statistical reports you can also check the forwards, ratings and errors associated to a particular campaign. By clicking on export to XML or CSV you can have your result exported to your favorite analysis program such as EXCEL.

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Working with Personalization

Now that we have seen how to create our campaigns with different methods and options – let us learn how to spice up the campaign with personalized fields and messages.

Personalize your campaigns, auto responders, system generated emails, etc.

In order to personalize our campaigns, auto responders, and other system generated emails we will need to use the dynamic tags. MarketingPro provides a very advanced and dynamic tag system which can help you personalize your campaign and other emails in the matter of no time.

We will show you how to add these tags and personalize your emails so as to make sure that the subscribers receiving these mails feel that it was addressed to them and not to a bunch of random people. For example if you have to send an email to 100 subscribers with their own names or surnames appearing in the newsletter. [e.g. Dear Mr. Lynch]. Now if you are sending this email through outlook express or any other email client you will need to generate each email separately to add the personalized message.

MarketingPro provides you the facility to reduce your work by adding only a tag which will be processed by MarketingPro backend and appropriate value is added from the database. To do this, follow the steps of creating a campaign up to the rich editor and design email section. In the Rich Editor, click on the "%", to open up a pop up window. You will be able to see the personalization wizard which will allow you to choose different information sets and its tags to be added to your newsletter for personalization.

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You have following options for adding the personalized tags into your campaign.

- **Insert recipient info:**

  You can insert the recipient information such as - subscriber id number, email address, bounce type, password and custom fields.

- **Insert recipient subscription info:**

  You can add the recipient subscription information such as - mail list subscription ID number, opt-in confirmation status, opt-out confirmation status, subscription status, subscription date, un-subscription date, opt-in confirmation date, opt-out confirmation date, subscription IP address, un-subscription IP address.

- **Insert mail list info:**

  You can add the mailing list information such as – mail list ID number and name of the mailing list.

- **Insert campaign info:**

  You can add the campaign information such as – name of the campaign.

- **Insert links:**

  You can insert the links into your newsletter such as - current date, current date with custom formatting, remote content from another location, recipient mail list IDs of this campaign, browser version of this email, subscriber account area, un-subscription link, un-subscription link for custom mail lists, rating the email, forwarding email to friends, opt in/out confirmation link.

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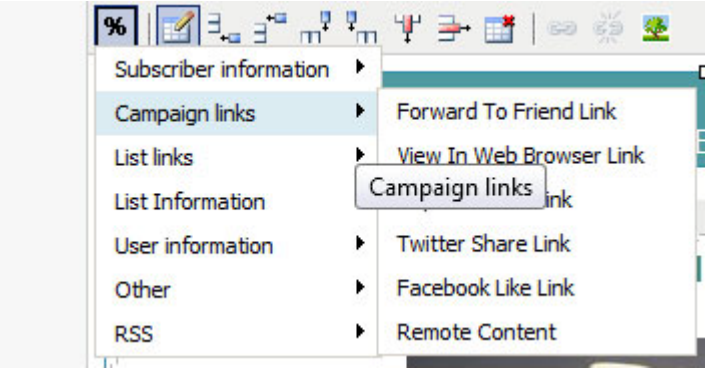

When you click on the drop down menu and select one of these options you should see the respective tags menu right next to it which will open another menu and will allow you generate these tags. That's about it. So from now on you need to write Dear Sir or Dear Madam but you can integrate MarketingPro's personalization tools, to make every email personalized for every one of your subscribers.

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Working with Auto Responders

Auto responders let you to send sequential follow-up emails after a specific event such as subscription or link click. You can create unlimited sequential auto responders for each event in each subscriber list. In this section we will see how to set the auto responders with different options and assign them to the mailing lists.

Auto responders can be set to send out password reminders, automated follow ups & more.

Creating unlimited auto responders and assigning them to multiple lists

In order to create the auto responders you need to click on the lists tab on user dashboard and select your list that you want to create auto responders for, and then click on auto responders.

Here you can create unlimited number of auto responders emails, and you can add all the details about your auto responder – let us see what all fields we need to populate the information. Before we check that out you can also use the existing auto responder.

Now let's discuss about these fields.

Name:

Here you can write the descriptive name of your auto responder.

Sender Name:

Select the Sender Name – you can add Auto Reply as the sender name as well. You can have anything for that matter.

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Sender email address:

The email address which will show in the From field of the recipient's email.

Reply-to Name:

Add the reply-to name if it is other than the senders name.

Reply-to email Address:

Add reply to email address if it is other than the senders email address.

Send:

Schedule the send option of your auto responder.

Triggers on:

Here you can assign an event which the auto responder will react to. For example if you set it on "Campaign open", whenever the subscriber opens that campaign email, he will receive the auto responder email that you have created.

Once you fill all these fields in Create New Auto Responder, click on the "CREATE AUTO RESPONDER AND EDIT EMAIL" button. This will take you to the next step which is very similar to Creating Your Campaign. So you can create the email from scratch, Fetch from URL, or use a Template from the Template Gallery to build your email. The HTML editor and the TEXT editor again depends on the preferences you set while creating a new auto responder. Once you add the necessary content just click on the "Add auto responder" button just below the HTML editor and your auto responder will be added to the MarketingPro's follow up database.

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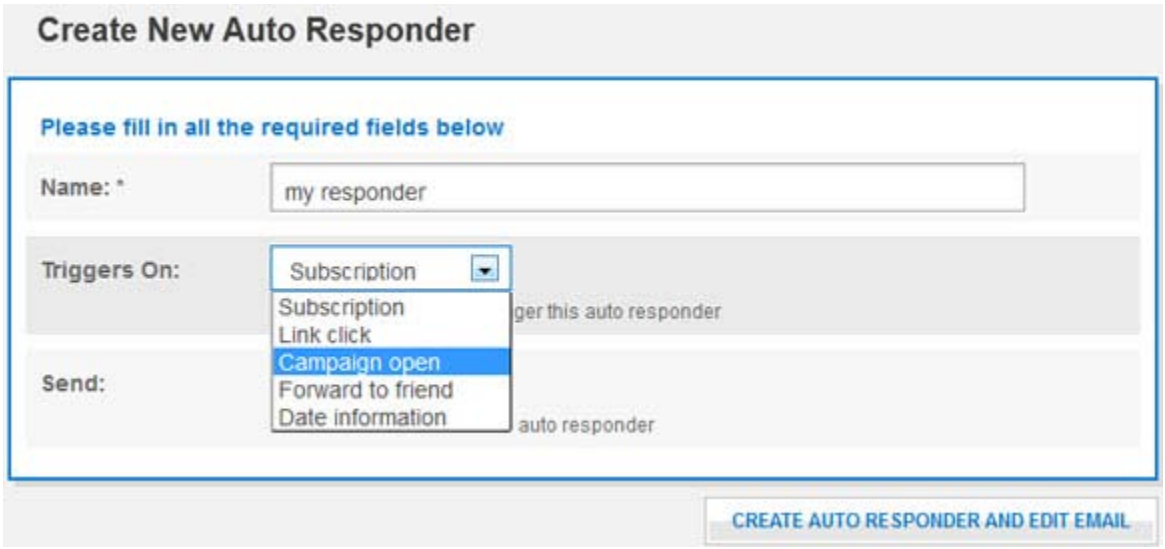

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Working with Campaign Clients

In the last section we learned how to work with auto responders and add them to different mailing lists as a follow up email. In this section let us see how to work with campaign client accounts.

If you are planning to do a campaign management for one of your clients, then you will send a newsletter to your client's subscribers list and now if you want to allow your client to check the statistical reports, what will you do? Well MarketingPro has the solution for you. "Client Accounts" are useful if you are sending email campaigns on behalf of your customers. You can give them access to a reporting-only authorized area in MarketingPro and let them view their campaign statistics in real time. You can create Client Accounts and set your client up with a USER NAME and PASSWORD, and once they login, they only see the statistics related to the campaign and the list you have set up for them.

Creating client accounts and assigning them the mailing lists to track the campaigns

Adding a client to your MarketingPro database is very simple. In order to create a client account go to "Settings" on user dashboard and then click on "Clients" on the left menu, and you will be able to see the existing clients list if you have added any clients previously.

Now you have to click on the “Create Client” link. Once you do that you will be given multiple of options – like assigning campaign and mailing list to client, the name of the client, username and the password. Following are the fields we need to populate:

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Lists to assign:

Select a single mail list or multiple mail lists from the menu. In order to select the multiple mail lists you need to hold down the CTRL key and go on selecting the lists.

Name:

Enter the Name of the client.

Email:

Email address of the client.

Username:

Username you wish to assign it to a client.

Password:

Password for the username assigned.

Once you fill up all the required fields, click on "CREATE NEW CLIENT" button and add this client to your database. You can assign a client's account to multiple lists if that client owns more than one mailing list. The client will be able to log in to his control panel and check out the existing processed campaigns – its statistical data and he can also check the campaigns which are being processed. The client account can track these campaigns live from within their client area.

Working with Statistical data

After going through all the other features of MarketingPro such as settings, creating new campaigns, lists, subscribers – now let us talk about the Statistical data. This is the most important feature required to track the success rate of your campaign and the overall MarketingPro system activities.

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MarketingPro provides a comprehensive set of statistical reports and data related to your campaigns, subscriber's subscriptions, un-subscriptions, bounced emails etc.

MarketingPro provides following types of statistical reports:

- **Bounce Statistics:**

  MarketingPro detects the bounced back emails and can process them in different categories like soft bounce, hard bounce, etc. This will help the administrators to take the necessary actions, as to either remove these email addresses from the database or to see if it was due to some error or not.

- **Subscriber Activities:**

  This kind of statistics will give you the detailed idea about the subscriber activities – such as subscriptions – un subscriptions, opening, clicking on links, etc.

- **Subscriber Statistics:**

  This will give you the subscriber statistics – the number of people subscribed to each mailing list.

- **Campaign Statistics:**

  This will give you the detailed statistics for the campaigns you process through MarketingPro, such as how many emails were sent or how many emails had permanent errors, etc.

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Understanding recipient statistics

Now that we know how to check the different statistical reports of MarketingPro database, let's check the basic concepts of recipients' statistics. Let us understand what are read ratio, link click tracking and forward to friend concepts.

Opens (Read Ratios)

What are Opens?

MarketingPro will automatically track how many of the subscribers have actually opened and read the email, and will generate a statistical report. This is a great utility in order to track the success of your campaign. In order to check the read ratios of the sent campaigns, click on the "Campaigns" tab on user dashboard and then select the campaign you wish to check. The overview screen will give you the basic statistics of the campaign you sent – details like total recipients, sent recipients, failed transmissions, and overall process and the duration of the campaign.

To get the read ratios you need to click on "Opens" on the left menu and you will see a detailed report of opens and comparison to the average. A visual graph also gives you a better understanding of the overall report.

Clicks (Link click tracking)

Link click track is another feature which allows you to track how many subscribers and how often click on the links in your campaign. In order to check the link click ratio of the sent campaigns you need to select the campaign you wish to check the link click ratio for and then click on the "Clicks" on the left menu.

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This will give you the graphical statistical reports on how many links are clicked, when they are clicked and by which subscriber.

Forward to a friend utility and statistics

“Forward to a friend” is the small utility provided by MarketingPro for subscribers. The subscribers who receive the email can directly forward the same email to their friends or co-workers, etc.

In order to check the forward to a friend statistics of the sent campaigns you need to select the campaign you wish to check the forward to a friend statistic for, and then click on “Forwards” on the left side. These details could help you contact the prospects who received the forwarded email from their friends.

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